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1995/96 SCHOOL BOARD INTERIM EDUCATION PLANS

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Preface

Planning in education is an essential part of ensuring that all students have equitable opportunities to acquire the knowledge, skills and attitudes they need to be self-reliant, responsible, caring and contributing members of society and ensuring that resources for education are used in the best possible ways to meet the educational needs of Alberta's young people.

School board plans outline priorities for student learning in the jurisdiction, guide budget development, and form the basis for reporting on progress and achievement. Over the years, school boards in Alberta have been developing plans and budgets for the education of their students consistent with provincial directions for education, and publishing annual education reports.

The importance of planning and reporting at the provincial and school board levels to improve education is acknowledged in the provincial three-year business plans for education, **Meeting the Challenge, 1994/95 - 1996/97** and **Meeting the Challenge II, 1995/96 - 1997/98**. These plans are for the entire education system in Alberta and count on school board and school participation to achieve educational goals and to meet the learning needs of Alberta students.

In the provincial plans, implementing school board plans and annual results reports that meet provincial requirements and local needs is slated to start with the 1995/96 school year as part of enhancing accountability throughout the education system. These provisions of the provincial plan are applicable to accredited private schools as well.* This guide was developed to provide preliminary information to school boards on provincial requirements for their education plans and annual education reports.

Acknowledgments

Alberta Education would like to recognize the contributions made to the development of the materials in this guide by four superintendents representing the College of Alberta School Superintendents (CASS) who served on the CASS/Alberta Education's Technical Committee on School Board Plans: Dave Blacker, Red Deer Public School District; Brian Callaghan, Canadian Rockies Regional Division; Terry Gunderson, Elk Island Public Schools Regional Division; Sig Schmold, Pembina Hills Regional Division. Their comments and suggestions were very helpful in developing the materials for this guide.

* Throughout this guide the term "school board" refers to the governing body of public and separate school systems and accredited private schools in Alberta. The 1995/96 interim education plan financial reporting requirements for accredited private schools are noted on page 32.

Purpose of the Guide

This guide provides information to help school jurisdictions align their plans with the provincial plan for improving education, **Meeting the Challenge II**, and to help them prepare their November 1995 Annual Education Report.

This Guide outlines the provincial requirements for the 1995/96 school board interim education plans and the 1995 annual education report.

It also presents preliminary information about the three-year school board education plan for 1996/97 to 1998/99, and preliminary reporting requirements for the 1996 Annual Education Report, which will report on the interim plan. These reporting requirements may be modified by the recommendations of the MLA Implementation Team on Accountability.

More detailed information on the provincial requirements for the three-year education plan and the November 1996 Annual Education Report will be available by the fall of 1995. **The mandatory measures for the three-year school board plan will be determined once the recommendations of the MLA Implementation Team on Accountability have been considered.**

Updates on the information in this Guide will be provided to school boards to reflect on-going developments, such as the consultations and recommendations on Roles and Responsibilities and Accountability.

Overview of School Board Planning & Reporting

The province and school boards must put their resources to best use to ensure that all students have access to the best possible education. All partners in education must work together to make improvements throughout the education system.

To ensure that common objectives are pursued throughout the education system, school boards are required to align their plans with provincial directions for education contained in Alberta Education's updated three-year business plan, entitled **Meeting the Challenge II, 1995/96 to 1997/98**, and to report specified information in their Annual Education Reports starting in 1995/96.

Over a three-year period, from 1995-96 to 1997-98, the provincial government will phase in implementation of three-year education plans and performance measures for school boards, consistent with the provincial plan for education.

SCHOOL BOARD EDUCATION PLANS

The first phase of aligning school board plans with the provincial plan for education is for school boards to develop interim one-year education plans for 1995/96. School boards are required to submit these interim plans to the Minister of Education by **September 30, 1995**. These interim plans will document the planning school boards have done in the winter and spring of 1995 in preparation for the 1995/96 school year.

The first comprehensive three-year school board education plan will be developed for 1996/97 to 1998/99. The school board three-year plan is due to the Minister by **April 30, 1996** along with the Budget Report Form. Thereafter, updated three-year plans will continue to be due to the Minister by April 30 each year.

Developing education plans, consistent with the provincial three-year plan, provides school boards with the opportunity to:

- clearly outline improvements in education for students in their jurisdictions in keeping with provincial directions and goals
- build on accomplishments, including previous plans and results
- build support and cohesiveness in their communities and among their system and school staff
- ensure budgets are consistent with the funding framework and directed to meet the education needs of students as well as provincial and local priorities
- measure and report on the achievement of both provincial and local education goals
- use results information to make further improvements to the education students receive and to the operations of jurisdictions and schools, and
- have the information they need to demonstrate the strengths of the education system in their jurisdiction and schools, and to identify areas for improvement.

School boards are encouraged to involve jurisdiction and school staff (especially teachers), School Council representatives, and other members of their communities in developing their school board education plans. This involvement improves communication, fosters co-operation, supports school-based decision making and results in better identification of student needs and a more workable plan.

In many school jurisdictions, schools already are involved in planning, budgeting and reporting activities as part of the school jurisdiction planning process and school-based decision making. School-level involvement ensures the entire education system focuses on key improvements and the educational needs of students.

School board education plans are intended to guide decision-making in the school jurisdiction. Key jurisdiction and school staff should have copies for their use.

School board education plans should also be available to the members of the communities served by the jurisdiction. School boards may wish to publish highlights of their plan, rather than the entire document, for widespread distribution to staff, parents, students and other members of their communities. The complete plan should be available for public review in the school board office.

REPORTING ON RESULTS

The provincial three-year plan for education, **Meeting the Challenge II**, focuses on results and accountability. Determining what results are desired and measuring and reporting on what has been accomplished – what works, what doesn't, what else needs to be done – are essential to good planning throughout the education system.

To use results to improve education, the province and school boards must identify and measure important outcomes for education on an annual basis. This information helps both the province and school boards to assess and to report on progress and achievements. The provincial plan for education includes 18 results and 29 performance measures. The provincial results report in June 1995 will report on these results and measures.

Aligning annual school board results reports with provincial performance measures will start with the November 1995 Annual Education Report. These school board reports will include student achievement, program and financial information specified by the provincial government as well as information that reflects local concerns, interests and priorities.

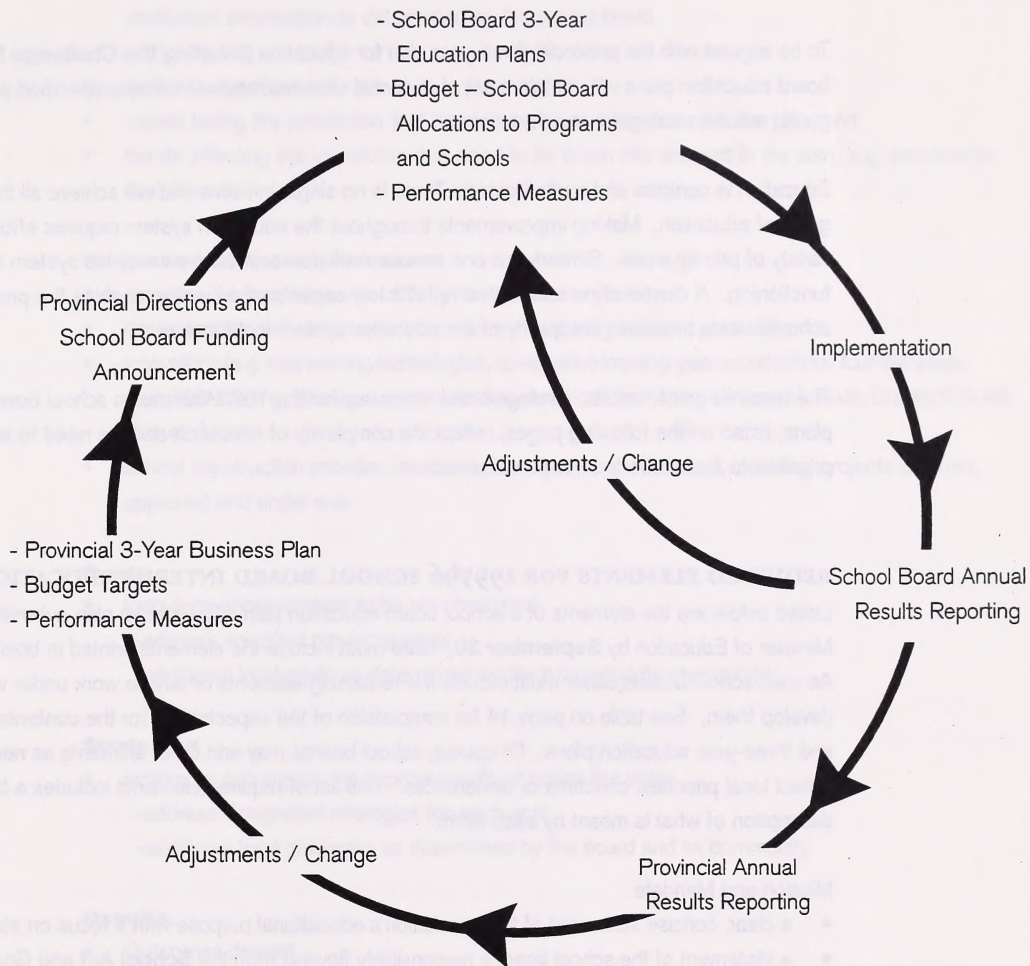
In their November 1996 Annual Education Reports, school boards will report to the Minister on the provincial and local measures identified in their 1995/96 interim education plans.

The November 1997 school board Annual Education Reports to the Minister will include information on the provincial mandatory measures and local measures listed in the school board three-year education plans.

The set of mandatory provincial performance measures will be identified following the consultations with Albertans and recommendations to the Minister by the MLA Accountability Implementation Team. The work of the MLA Team also may modify the preliminary measures for reporting in November 1996.

School boards will want to identify in their interim plan additional performance measures for assessing and reporting on achievement of local education goals.

PROVINCIAL AND SCHOOL BOARD PLANNING, BUDGETING AND REPORTING CYCLE



Provincial Requirements: 1995 / 96 Interim School Board Education Plans

To be aligned with the provincial three-year plan for education (**Meeting the Challenge II**), school board education plans will contain a set of essential elements and will address specified provincial goals, results, strategies, and measures.

Education is complex and multi-faceted. There is no single initiative that will achieve all the important goals of education. Making improvements throughout the education system requires effort in a variety of priority areas. Similarly, no one measure will demonstrate how well the system is functioning. A cluster of measures that reflects key aspects of education enables the province and school boards to assess the quality of the education system in Alberta.

The required goals, results, strategies and measures for the 1995/96 interim school board education plans, listed on the following pages, reflect the complexity of education and the need to select priorities to focus efforts on improvements.

REQUIRED ELEMENTS FOR 1995/96 SCHOOL BOARD INTERIM EDUCATION PLANS

Listed below are the elements of a school board education plan. The interim plan submitted to the Minister of Education by **September 30, 1995** must include the elements printed in boldface type. As well, school boards either must include the remaining elements or outline work under way to develop them. See table on page 14 for comparison of the expectations for the contents of interim and three-year education plans. Of course, school boards may add other elements as needed to reflect local priorities, concerns or preferences. This list of required elements includes a brief description of what is meant by each term:

Mission and Mandate

- a clear, concise statement of the jurisdiction's educational purpose with a focus on students
- a statement of the school board's responsibility flowing from the **School Act** and Goals of Schooling

Vision and Beliefs

- a description of the fundamental character of education desired 3 to 5 years from now
- belief statements that incorporate the values of the school system

Jurisdiction Profile/Context

- a brief description of the school jurisdiction and the community it serves, including number of students, programs provided, programming for students with special needs (e.g., mild, moderate, severe, gifted), student-teacher ratios, characteristics of the community served, and other contextual information as determined by the school board.

Environmental Factors

- issues facing the jurisdiction that need to be taken into account in the plan, and
- trends affecting the jurisdiction that need to be taken into account in the plan, e.g. enrolments over time

Progress and Accomplishments

- progress/accomplishments of the previous plan or year
- implementation of recommendations from monitoring activities, or audits
- innovations (e.g. new learning technologies, co-operative learning, year-round school, four-day week, workplace learning, inter-agency co-ordination of services for children with special needs, Charter Schools pilot, etc.), and
- school construction priorities (modernizations, new schools, etc.), including projects planned, approved and under way

Goals

- long-term improvements to be accomplished
 - address specified provincial goals
 - additional local goals as determined by the board and its community

Strategies

- actions to accomplish the improvements or realize the vision
 - address designated strategies for each goal
 - additional local strategies as determined by the board and its community

Results

- Outcomes desired
- designated provincial results related to goals
- local results as determined by the board and its community

Performance Measures

- information that will be used to assess and report on outcomes and achievements
- mandated provincial performance measures related to provincial goals and results
- local measures as determined by the board
- trends – performance over time, and
- benchmarks and targets for provincial and local measures (not required for 1995/96)

School Board Expenditure Plan (required reporting format, Tables 2-4, pages 24,27,29)

- a summary of the school board's budget for the school year consistent with the provincial Funding Framework and the Budget Report Form, including
 - expenditures on instruction and support
 - expenditures and transfers where provincial limits apply
 - capital revenue and expenditures
- a brief description of how school board resources are being used to implement the jurisdiction's plan

Implementation Schedule

- the completion year for key strategies, and
- a logical sequencing of strategies

Planning Process and Communications Plan

- a brief description of the planning process used to prepare the plan, including involvement of parents, students, staff and other community members, and
- a brief description of the strategies used to communicate about the plan to parents, students, staff and other community members

Other

- as determined by the school board and its community

REQUIRED PROVINCIAL GOALS, RESULTS AND STRATEGIES

Listed below are the provincial goals, results and strategies that school boards are to address in their 1995/96 interim education plans. These goals, results and strategies focus on the actions that are key to improving education for students and to implementing the provincial three-year plan for education by school boards and Alberta Education.

School boards may wish to express these provincial goals in their own words to reflect their jurisdiction's perspective. School board plans may include additional strategies, within these provincial goals, to reflect local needs and actions to be taken on the local level to achieve provincial goals.

The required provincial goals, results and strategies reflect key directions for the public education system in Alberta. It is appropriate for school boards to add other goals, results and strategies that recognize other educational needs in their jurisdiction.

The required provincial goals, results and strategies are listed below. The format to be used to report provincial and school board goals, strategies, results and measures for the school board interim plan is provided in Table 1-1995/96 Interim School Board Plan, Goals, Strategies, Results, Measures Format starting on page 18.

Required Provincial Goals, Results and Strategies for the 1995/96 Interim Education Plan

- Goal 1: Focus education on what students need to learn; ensure that high standards are established, communicated and achieved.
Results:
-Students achieve the standards in the provincial curriculum.
-Students receive the education they need to prepare them for entry into the workplace and post-secondary studies.
Strategies:
-Work under way to ensure that teachers know and can apply the provincial standards for the subjects/grades that they teach.
-Preparations under way for implementing Career and Technology Studies by September 1997.
- Goal 2: Provide parents with greater opportunity to select schools and programs of their choice and enable greater parental/community involvement in education.
Results:
-Parents have opportunities to choose schools and programs for their children within the public education system.
-Business and the community have a meaningful role in education.
Strategy: Work under way to implement new School Councils by February 1996.
- Goal 3: Improve the coordination of services for children with special needs.
Result:
-Students with special needs have access to the services they require.
Strategy: Plans to enhance programs and services for children with special needs, including work under way with other local agencies to coordinate and integrate services for these children.
- Goal 4: Improve teaching.
Result:
-Teachers have the skills and knowledge required to help students learn.
Strategy: Professional development opportunities planned for teachers.
- Goal 5: Achieve increased efficiencies and effectiveness in the education system through restructuring the governance and delivery of education.
Results:
-School jurisdictions and schools are efficient in their use of available resources.
-School jurisdictions and schools are effective in providing all students with opportunities for success.
Strategies:
-Work under way to implement school-based decision making.
-Inservice planned that facilitates implementation of school-based decision making.

- Goal 9: Ensure that the education system is open and accountable.

Results:

- School boards and schools systematically use performance measure results to make continuous improvements to education.
- Albertans have timely and meaningful information about student achievement, and the performance and cost of education at the school jurisdiction and school levels.

Strategy: Work under way to develop and implement school board education plans and annual results reports that meet provincial requirements and local needs.

Annual Education Reports

School Board Annual Education Reports on the 1994/95 school year are due to the Minister of Education by **November 30, 1995**. The Annual Education Report on the 1995/96 interim plan and preliminary performance measures is due to the Minister of Education by **November 30, 1996**.

PROVINCIAL REPORTING REQUIREMENTS: NOVEMBER 1995 ANNUAL EDUCATION REPORT

School boards are required to submit Audited Financial Statements (AFS) and Annual Education Reports (AER) to Alberta Education in November each year. The AER is published in the jurisdiction as well to inform the community about school jurisdiction performance.

The province expects school boards to include the following information in their November 1995 Annual Education Report:

- Student achievement results:
 - Provincial achievement test results, grades 3, 6, and 9, compared with provincial standards and results
 - Diploma examination results, for all relevant courses, compared with provincial standards and results, including participation rates
- Programs offered in the jurisdiction, including programming for students with special needs (e.g., mild, moderate, severe, gifted)
- Priorities and major initiatives in 1994/95
- 1994/95 expenditure summary (based on AFS), including per-student spending and instructional expenditures as a percent of total spending

There is no required format for the November 1995 Annual Education Report.

PRELIMINARY REPORTING REQUIREMENTS: NOVEMBER 1996 ANNUAL EDUCATION REPORT

The Annual Education Reports, submitted to Alberta Education by school boards in November 1996, will include results information on the 1995/96 school year. Results of provincial and local performance measures, identified in the 1995/96 school board interim plans, will be included in the reports.

The need for a common format for school board reporting on performance measures starting with the November 1996 Annual Education Report is under review. More information will be available on this by Fall 1995.

The November 1996 Annual Education Report will describe the implementation of strategies in the 1995/96 school board interim education plan and on designated performance measures. The preliminary provincial performance measures listed below must be identified in the 1995/96 interim education plans. These measures may be modified as a result of the work of the MLA Team on Accountability. School boards will be notified of any change as soon as the information is available. In the interim plans, school boards also will need to identify any additional local performance measures that will be used to assess and report on their progress and achievements.

In preparation for the November 1996 results report, school jurisdictions will need to assemble trend information on the measures for which there is historical data. Determining benchmarks (latest available information) and establishing targets (desired performance level) is optional for the interim plan.

The following preliminary provincial performance measures are to be listed in the interim plan and reported on in school boards' November 1996 Annual Education Reports:

- Percent of students who achieve the acceptable standard and percent of students who achieve the standard of excellence on:
 - provincial achievement tests
 - diploma examinations, including participation rates
- Percent of parents who are satisfied with
 - their children's schooling, and
 - the quality of information from schools about their children's progress and educational achievement
- Percent of students who are satisfied with
 - their school overall
 - variety and challenge in classroom and school activities
 - opportunities to make decisions about their learning and career paths
 - clarity of expectations for their learning, behavior, and involvement at school
 - the help and support they receive from school staff
- Percent of school jurisdiction spending on instruction, and
- Spending per student per school year.

Survey instruments have been developed for Alberta Education to measure satisfaction with important aspects of education in the province. By Fall 1995 these will be made available to school boards for use in their jurisdiction.

A telephone survey of a provincial sample of parents, high school students, teachers, principals, employers, post-secondary instructors and the public was conducted in Spring 1995. The results of this provincial survey will be included in the June 1995 provincial results report.

Implementation of School Board Plans & Results Reports

COMPARISON OF SCHOOL BOARD INTERIM AND THREE-YEAR EDUCATION PLAN CONTENTS

1995/96 Interim Plan	Three-Year Plan 1996/97 - 1998/99
due September 30, 1995	due April 30, 1996
<ul style="list-style-type: none"> Local Mission and Mandate (or indicate work under way) 	<ul style="list-style-type: none"> Confirmed
<ul style="list-style-type: none"> Outline of Vision and Beliefs for jurisdiction (or indicate work under way to develop vision and belief statements for the jurisdiction) 	<ul style="list-style-type: none"> Confirmed
<ul style="list-style-type: none"> Jurisdiction Profile/Contextual information: number of students, teachers, schools; PTR; student programs provided including special needs; location in province, area served, etc. 	<ul style="list-style-type: none"> Update
<ul style="list-style-type: none"> Environmental Factors: issues and trends to be addressed in the plan 	<ul style="list-style-type: none"> Update
Progress and Accomplishments in past year on jurisdiction priorities	Progress and Accomplishments of the Interim Plan
Implementation of Monitoring/Audit Recommendations	Update
Innovations in place (e.g. alternative schedules, cooperative learning, new learning technology, workplace learning, inter-agency coordination of services for children with special needs, Charter School pilot)	Update
School construction priorities, including projects planned, approved and under way	Update
<ul style="list-style-type: none"> Goals, Results, Strategies and Measures – provincially required and local <p>Plan addresses:</p> <ul style="list-style-type: none"> - Six (of 9) provincial goals - Ten (of 18) provincial results - Eight (of 40) provincial strategies - Five (of 29) provincial measures (preliminary) <p>Benchmarks and targets for measures optional</p>	<ul style="list-style-type: none"> Expanded and updated <p>Eight provincial goals are required to be addressed in the 3-year plan. Complete list of provincial results and strategies to be addressed and set of mandatory provincial measures will be announced by Fall 1995</p> <p>Benchmarks and targets included</p>
<ul style="list-style-type: none"> One-year expenditure plan (reflecting Funding Framework and jurisdiction priorities), including spending for instruction, support and capital <p>Brief description of use of resources to implement plan</p>	<ul style="list-style-type: none"> Three-Year Expenditure Plan (budget for first year and targets for years 2 and 3) <p>Update</p>
<ul style="list-style-type: none"> Implementation Schedule 	<ul style="list-style-type: none"> Three-Year Implementation Schedule
<ul style="list-style-type: none"> Brief description of Planning Process and Communications Plan used (optional) 	<ul style="list-style-type: none"> Update
<ul style="list-style-type: none"> Budget Report Form for 1995/96 submitted by April 30, 1995 	<ul style="list-style-type: none"> Budget Report Form for 1996/97 submitted with three-year plan

IMPLEMENTATION SCHEDULE: SCHOOL BOARD AND PROVINCIAL PLANS AND ANNUAL RESULTS REPORTS

Month	School Boards	Government/Alberta Education
Feb 95	<ul style="list-style-type: none"> CASS/ASBOA meetings on new provincial plan, new Budget Reform Form, and draft guide to School Board Education Plans, Calgary and Edmonton 	<ul style="list-style-type: none"> Funding Framework and funding to school boards announced Provincial Budget '95 Updated Three-Year Business Plan (Meeting the Challenge II) published, including budget targets
Apr 95	<ul style="list-style-type: none"> Budget Report Form due CASS/Alberta Education Annual Joint conference - workshop on school board education plans 	<ul style="list-style-type: none"> Ministerial announcement to trustees and the public re interim school board plans; Guide published and distributed to school boards CASS/Alberta Education Annual Joint conference
Jun 95		<ul style="list-style-type: none"> Government's Annual Performance Measures Report Alberta Education's annual report on business plan performance measures
Sep 95	<ul style="list-style-type: none"> School Board Interim Education Plans, 1995/96 due to Minister 	
Oct 95	<ul style="list-style-type: none"> School Board elections 	
Nov 95	<ul style="list-style-type: none"> ASBA Convention School Board Annual Education Reports, (1994/95 results) due to the Minister Audited Financial Statement 1995/96 Accredited Private School Interim Education Plans and Budget Report Form due to the Minister 	<ul style="list-style-type: none"> Minister's Report to the Legislature on Interim School Board Plans Mid-year Provincial Performance Report Feedback to school boards on interim plans
Dec 95		<ul style="list-style-type: none"> Guide to three-year school board education plan & annual results reporting distributed to school boards
Jan 96		<ul style="list-style-type: none"> Funding announcement Feedback to school boards on annual education reports
Feb 96		<ul style="list-style-type: none"> Provincial Budget '96 Updated 3-Year Business Plan (Meeting the Challenge III) published

Mar 96		<ul style="list-style-type: none"> Minister's Report to Legislature on School Board Annual Education Reports Alberta Education's annual report on business plan performance measures
Apr 96	<ul style="list-style-type: none"> School Board Three-Year Education Plans, 1996/97 - 1998/99, including 96/97 budget (BRF) and 2-year targets 	
Jun 96		<ul style="list-style-type: none"> Feedback to school boards on three-year plan Government's Annual Performance Measures Report
Sep 96		<ul style="list-style-type: none"> Minister's Report to Legislature on School Board Three-Year Plans
Nov 96	<ul style="list-style-type: none"> School Board Annual Education Report on interim plan (1995/96 results) Audited Financial Statement 	<ul style="list-style-type: none"> Mid-year Provincial Performance Report
Jan 97		<ul style="list-style-type: none"> Funding Announcement Feedback to school boards on annual education reports
Feb 97		<ul style="list-style-type: none"> Provincial Budget '97 Updated 3-Year Business Plan
Mar 97		<ul style="list-style-type: none"> Minister's Report to Legislature on School Board Annual Education Reports Alberta Education's annual report on business plan performance measures
Apr 97	<ul style="list-style-type: none"> Updated School Board Three-Year Education Plans, 1997/98 - 1999/2000, including 97/98 budget (BRF) and 2-year targets 	
Jun 97		<ul style="list-style-type: none"> Feedback to school boards on three-year plans Government's Annual Performance Measures Report
Sep 97		<ul style="list-style-type: none"> Minister's report to Legislature on School Board Plans
Nov 97	<ul style="list-style-type: none"> School Board Annual Education Report on three-year plan, (1996/97 results) Audited Financial Statement 	<ul style="list-style-type: none"> Mid-year Provincial Performance Report
Etc.	<ul style="list-style-type: none"> Integrated Provincial and School Board planning, budgeting and performance reporting continues 	

Appendices

GLOSSARY OF TERMS

Context for Education

- Environmental Factors • the key trends and issues expected to influence the organization's operating environment

Where We Want To Be (Our Desired Future)

- Vision • a description of the fundamental character of education desired 3-5 years from now
- Mission • a simple statement of the organization's purpose or reason for being, focusing on students
- Goal • desired improvements or key changes that must take place over time to achieve the vision
- Result • the measurable, specific outcomes of achieving a goal

How We Achieve Our Desired Future

- Strategy • the key steps or actions taken to achieve goals
- Financial Plan • expenditure summary and description of how resources are used to address priorities, implement the plan
- Implementation Schedule • logical sequencing of strategies over the plan period with specified completion year

Measuring the Achievement of Our Desired Future

- Performance Measures • the performance data by which progress towards achieving goals is assessed
- Trend • direction of performance data over time. A trend may show increasing, decreasing or static data values
- Benchmark • the state or level of performance at a particular point in time. Benchmark data provide the basis for performance comparison over time
- Target • the specific level of performance to be achieved or maintained within a given period of time

TABLE I: INTERIM SCHOOL BOARD PLAN, 1995/96 – GOALS, STRATEGIES, RESULTS, MEASURES FORMAT

Provincial Goal 1. Focus education on what students need to learn; ensure that high standards are established, communicated and achieved.
Matching jurisdiction goal:

Strategies and Completion Year	Results for Goal	Measures for Goal	Benchmark (not required for 1995/96)	Target (not required for 1995/96)
Required: • Work under way to ensure that teachers know and can apply the provincial standards for the subjects/grades that they teach • Preparations under way for implementing Career and Technology Studies by September 1997 Other Local: • • • • • •	Required: • Students achieve the standards in the provincial curriculum • Students have access to the education they need to prepare them for entry into the workplace and post-secondary studies Other Local: • • • • • •	Required: • Percent of students who achieve the acceptable standard and percent of students who achieve the standard of excellence on: -provincial achievement tests -diploma examinations, including participation rates Other Local: • • • • • •		

TABLE 1: INTERIM SCHOOL BOARD PLAN, 1995/96 – GOALS, STRATEGIES, RESULTS, MEASURES FORMAT

Provincial Goal 2. Provide parents with greater opportunity to select schools and programs of their choice and enable greater parental/community involvement in education.

Matching jurisdiction goal:

Strategies and Completion Year	Results for Goal	Measures for Goal	Benchmark (not required for 1995/96)	Target (not required for 1995/96)
Required: • Work under way to implement School Councils by February 1996 Other Local: • • • • • •	Required: • Parents have opportunities to choose schools and programs for their children within the public education system • Business and the community have a meaningful role in education Other Local: • • • • • •	Required: • Percent of parents who are satisfied with their children's schooling Other Local: • • • • • •		

TABLE I: INTERIM SCHOOL BOARD PLAN, 1995/96 – GOALS, STRATEGIES, RESULTS, MEASURES FORMAT

Provincial Goal 3. Improve the co-ordination of services for children with special needs.

Matching jurisdiction goal:

Strategies and Completion Year	Results for Goal	Measures for Goal	Benchmark (not required for 1995/96)	Target (not required for 1995/96)
<p>Required:</p> <ul style="list-style-type: none"> Plans to enhance programs and services for children with special needs, including work under way with other local agencies to coordinate and integrate services for these children <p>Other Local:</p> <ul style="list-style-type: none"> 	<p>Required:</p> <ul style="list-style-type: none"> Students with special needs have access to the services they require <p>Other Local:</p>	<p>Required:</p> <p>Other Local:</p> <ul style="list-style-type: none"> 		

TABLE I: INTERIM SCHOOL BOARD PLAN, 1995/96 – GOALS, STRATEGIES, RESULTS, MEASURES FORMAT

Provincial Goal 4. Improve teaching.**Matching jurisdiction goal:**

Strategies and Completion Year	Results for Goal	Measures for Goal	Benchmark (not required for 1995/96)	Target (not required for 1995/96)
Required: • Professional development opportunities planned for teachers	Required: • Teachers have the skills and knowledge required to help students learn	Required:		
Other Local:	Other Local:	Other Local:		
•		•		
•		•		
•		•		
•		•		
•		•		

TABLE I: INTERIM SCHOOL BOARD PLAN, 1995/96 - GOALS, STRATEGIES, RESULTS, MEASURES FORMAT

Provincial Goal 5. Achieve increased efficiencies and effectiveness in the education system through restructuring the governance and delivery of education.

Matching jurisdiction goal:

Strategies and Completion Year	Results for Goal	Measures for Goal	Benchmark (not required for 1995/96)	Target (not required for 1995/96)
Required: <ul style="list-style-type: none"> • Work under way to implement school-based decision making • In-service planned that facilitates implementation of school-based decision making 	Required: <ul style="list-style-type: none"> • School jurisdictions and schools are efficient in their use of available resources • School jurisdictions and schools are effective in providing all students with opportunities for success 	Required: <ul style="list-style-type: none"> • Percent of school jurisdiction spending on instruction • Percent of students who are satisfied with: -their school overall; -variety and challenge in classroom and school activities; -opportunities to make decisions about their learning and career paths; -clarity of expectations for their learning, behavior and involvement at school; and -the help and support they receive from school staff • Spending per student per school year 		
Other Local:	Other Local:	Other Local:		
•	•	•		
•	•	•		

TABLE I: INTERIM SCHOOL BOARD PLAN, 1995/96 – GOALS, STRATEGIES, RESULTS, MEASURES FORMAT

Provincial Goal 9. Ensure that the education system is open and accountable.**Matching jurisdiction goal:**

Strategies and Completion Year	Results for Goal	Measures for Goal	Benchmark (not required for 1995/96)	Target (not required for 1995/96)
Required: • Work under way to develop and implement school board education plans and annual results reports that meet provincial requirements and local needs	Required: • School boards and schools systematically use performance measure results to make continuous improvements to education • Albertans have timely and meaningful information about student achievement, and the performance and cost of education at the school jurisdiction and school levels	Required: • Percent of parents who are satisfied with the quality of information from schools about their children's progress and educational achievement		
Other Local:	Other Local:	Other Local:		
•		•		
•		•		
•		•		
•		•		
•		•		

TABLE 2: 1995/96 SCHOOL BOARD EXPENDITURE PLAN

Program	Total Expenditures (1)	Number of Students Served by Program (2)	Spending Per Student (3)
Student Instruction Grades 1-12 Expenditures			
a) Student Instruction Grades (1-12)	\$	#	\$
b) Severe Disabilities (sub-set of students 1-12)	\$	#	\$
c) School-Based Administration and Instructional Support	\$	#	\$
d) Student Instruction Grades 1-12 (sub-total)	\$	#	\$
Support Expenditures			
e) Schools – Operations and Maintenance	\$	#	\$
f) Student Transportation	\$	#	\$
g) School Board Governance and System Administration	\$	#	\$
h) System-Based Instructional Support	\$	#	\$
i) Support (sub-total)	\$	#	\$
j) Student Instruction and Support (sub-total)	\$	#	\$
Other Instruction Expenditures			
k) Home Education	\$	#	\$
l) Early Childhood Services	\$	#	\$
m) External Services (e.g., adult education, joint use agreements)	\$		
n) Total School Board Expenditures	\$		

Note: This form summarizing forecast expenditures reported on the Budget Report Form only applies to public and separate school boards. See next page for instructions for completing this expenditure plan; see page 32 for information on financial reporting for accredited private schools.



INSTRUCTIONS FOR COMPLETING TABLE 2, 1995/96 EXPENDITURE PLAN

The Expenditure Plan is a summary of school jurisdiction budgeted expenditures. Nearly all the information for completing Table 2 is found on or can be determined from the information provided on the Budget Report Form (Schedules 3, 4, 5, 13). The rest should be readily available from other jurisdiction records. For reporting student numbers in column 1, lines a, c-e, g-j, use the net enrolled student count estimated for 1995 reported on BRF Schedule 13. For the other lines in column 1 (b, f, k, l), report the specific numbers of students served by that program (students with severe disabilities, transported students, home education and ECS enrollment). Calculate spending per student (column 3) by dividing column 1 (total expenditures) by column 2 (number of students served) on each line (a-l) where this information is requested.

Student Instruction Grades 1-12 Expenditures

Line a – Student Instruction Grades 1-12:

Report all direct instructional spending on Grades 1-12 in column 1 and net enrolled students Grades 1-12 in column 2, then calculate per-student instructional spending, Grades 1-12 in column 3.

Line b – Severe Disabilities:

Include all expenditures budgeted for severely disabled students Grades 1-12 in column 1 (see BRF Schedule 5) and the enrollment of severely disabled students in column 2 (use the number reported to School Finance to access funds). Calculate per-student instructional spending for severely disabled students in column 3.

Line c – School-based Administration and Instructional Support:

Report expenditures budgeted for School-based Instructional Support in column 1 (see BRF Schedule 3), net enrolled students Grades 1-12 in column 2, then calculate per-student school-based administration and instructional support spending in column 3.

Line d – Student Instruction Grades 1-12 sub-total:

Report total instruction spending in column 1 (sum of lines a and c), net enrolled students Grades 1-12 in column 2, and calculate per-student instructional spending in column 3.

Support Expenditures

Line e – Schools - Operations and Maintenance (O & M):

Report total expenditures budgeted for O & M in column 1 (see BRF Schedule 3), net enrolled students Grades 1-12 in column 2, then calculate per-student O & M spending in column 3.

Line f – Student Transportation:

Report total spending on student transportation in column 1 (see BRF Schedule 3), the number of students transported in column 2, then calculate spending per transported student in column 3.

Line g – School Board Governance and System Administration:

Report total spending on school board governance and system administration in column 1 (see BRF Schedule 3), net enrolled students Grades 1-12 in column 2, then calculate per-student spending in column 3.

Line h – System-based Instructional Support:

Report total spending on system-based instructional support in column 1, net enrolled students Grades 1-12 in column 2, then calculate per-student spending in column 3.

Line i – Support Sub-Total:

Report total support expenditures in column 1 (sum of lines e-h) and net enrolled students Grades 1-12 in column 2, then calculate the per-student spending on support in column 3.

Student Instruction and Support Sub-Total**Line j – Student Instruction and Support Sub-total:**

Report total instruction and support expenditures in column 1 (sum of lines d and i), net enrolled students Grades 1-12 in column 2, then calculate the per-student spending on instruction and support in column 3.

Other Instruction Expenditures**Line k – Home Education:**

Include all expenditures for home education instruction and supervision in column 1, the number of home education students served in the jurisdiction in column 2, and calculate per-student spending on home education in column 3. (See BRF Schedules 3 and 13.)

Line l – Early Childhood Services:

Report all expenditures for ECS programming in column 1, and ECS enrollment (all ECS children – regular, special needs) on an FTE basis in column 2: 240 hrs. = .25 FTE (see BRF Schedule 13). Then calculate per-child spending in column 3.

External Services**Line m – External Services:**

Report total spending on external services in column 1 (see BRF Schedule 3).

Total School Board Expenditures**Line n – Total School Board Expenditures**

Report total school board budgeted expenditures in column 1 (sum of lines j-m, column 1). This total should match the total expenditures reported on Schedule 3 of the Budget Report Form.

TABLE 3: SUMMARY OF FUNDING FRAMEWORK LIMITS ON SPENDING AND TRANSFERS

Programs with Spending/ Transfer Limits	Spending/ Transfer Eligible Percentage (1)	Budgeted Expenditures & Transfers (2)	Base (3)	Expenditures & Transfers - Percent of Base (4)
a) School Board Governance and System Administration	%*	\$	\$	%
b) Transfer from Instruction to System-Based Instructional Support	up to 1.6%	\$	\$	%
c) Transfer from Instruction Block to Plant Operations and Maintenance		\$	\$	%
d) Transfer from Instruction Block to Student Transportation		\$	\$	%
e) Transfer from Instruction Block to Plant Operations & Maintenance & Student Transportation	up to 2%	\$	\$	%

Note: This table summarizing forecast expenditures and transfers reported on the Budget Report Form (Schedules 3,8,11) applies only to public and separate school boards. See next page for instructions for completing Table 3; see page 32 for information on financial reporting requirements for accredited private schools.

*Eligible percentage ranges from 4% to 6% of Instructional Block and Plant Operations and Maintenance and Student Transportation Funding, depending on jurisdiction enrolment.

INSTRUCTIONS FOR COMPLETING TABLE 3

Summary of Funding Framework Limits on Spending and Transfers

The information needed to complete Table 3 can be found on Schedules 8 and 9 of the Budget Report Form (BRF).

Line a – School Board Governance and System Administration:

In column 1 enter the maximum eligible percentage for school board governance and system administration from Schedule 8 of the BRF. This percentage cannot exceed 4%-6% of the base, depending on school jurisdiction enrollment. Report the total budgeted expenditure for School Board Governance and System Administration in column 2 and the base amount used to determine the maximum eligible percentage in column 3 reported on Schedule 8 of the BRF. Report in column 4 School Board Governance and System Administration expenditures as a percentage of the base (column 2 divided by column 3).

Line b – Transfers from Instruction to System-Based Instructional Support:

The maximum eligible amount that can be transferred from the Instruction Block and used for system-based instructional support is 1.6% of the base. This percentage is provided in line b, column 1. Report the amount transferred from the Instruction Block to system-based Instructional support in column 2 and the calculated base in column 3 (from Schedule 8 of the BRF). Report in column 4 System-based Instructional Support expenditures as a percentage of the base (column 2 divided by column 3); this percentage cannot exceed 1.6% of the allocation for Instruction.

Line c – Transfers from Instruction Block to Plant Operations and Maintenance

Report in column 2 the amount, if any, transferred from the Instruction Block to Plant Operations and Maintenance. Report the calculated base in column 3 (from Schedule 8 of the BRF), and in column 4 calculate the amount transferred from the Instruction Block to Plant Operations and Maintenance as a percentage of the base (column 2 divided by column 3).

Line d – Transfer from Instruction Block to Student Transportation

Report in column 2 the amount, if any, transferred from the Instruction Block to Student Transportation. Report the calculated base in column 3 (from Schedule 8 of the BRF), and in column 4 the percent transferred to Student Transportation from the Instruction Block (column 2 divided by column 3).

Line e – Transfer from Instruction Block to Plant Operations and Maintenance and Student Transportation

The maximum eligible percentage that can be transferred from the Instruction Block to Plant Operations and Maintenance and Student Transportation is 2%. This percentage is provided in line e of column 1. In column 2 report the total amount transferred from the Instruction Block to Plant Operations and Maintenance and Student Transportation (the sum of lines c and d, column 2), and report the calculated base in column 3 (from Schedule 8 of the BRF). Report the percentage transferred from the Instruction Block to Plant Operations and Maintenance and Student Transportation in column 4 (the sum of lines c and d, column 4). This percentage cannot exceed 2% of the Instruction Block.

TABLE 4: 1995/96 CAPITAL REVENUE AND EXPENDITURES SUMMARY

Sources of Revenue	Amount
a) Province - construction (new schools & modernizations)	\$
b) Province - debt retirement	\$
c) Province - building restoration (BQRP)	\$
d) Debt (unsupported)	\$
e) Gains on sales of assets	\$
f) Transfers from reserves	\$
g) Other sources (e.g., federal, gifts)	\$
h) Starting balance, August 31, 1995	\$
i) Total capital funding	\$

Expenditures	Amount
j) Land	\$
k) Buildings - new construction	\$
l) Buildings - modernizations	\$
m) Buildings - purchase	\$
n) Building restoration (BQRP)	\$
o) Equipment	\$
p) Vehicles	\$
q) Principal repayments on debt	\$
r) Interest payments on debt	\$
s) Losses on sales of assets	\$
t) Transfers to capital reserves	\$
u) Closing balance, August 31, 1996	\$
v) Total Expenditures	\$

Note: This table summarizing sources and applications of capital funding reported on Schedule 12 of the Budget Report Form applies only to public and separate school boards. See next page for instructions for completing Table 4; see page 32 for information on financial reporting requirements for accredited private schools

INSTRUCTIONS FOR COMPLETING TABLE 4**Summary of 1995/96 Capital Revenue and Expenditures**

Most of the information needed for completing this table is found on Schedules 1, 3, 4 and 12 of the Budget Report Form. The rest should be readily available from other jurisdiction financial records.

Sources of Revenue

Line a – Provincial funds for school construction:

Report on line a provincial capital funds for new schools and renovation/modernization of existing school buildings.

Line b – Provincial funds for debt retirement

Report on line b provincial capital funds allocated for retirement of capital debt.

Line c – Provincial funding for school restoration (BQRP)

Report on line c provincial funding from the Capital Block for school BQRP

Line d – Debt (unsupported)

Report on line d any funds borrowed for unsupported capital projects – long-term debt.

Line e – Gains on sale of assets

Report on line e any gains on disposal of capital assets.

Line f – Transfers from reserves

Report on line f any transfers from reserves.

Line g – Other sources

Report on line g all other sources of capital funding report on Schedule 12 of the Budget Report Form (e.g. municipal and federal sources, gifts, etc.)

Line h – Starting balance, August 31, 1995

Report on line h the balance in the capital fund at the beginning of the school year – unexpended (deficient) funds at August 31, 1995.

Line i – Total capital funding

Report on line i the total capital funding budgeted for the 1995/96 school year.

Capital Expenditures

Line j – Land

Report on line j all capital expenditures on land.

Line k – Buildings – new construction

Report on line k all capital expenditures on new school construction.

Line l – Buildings – renovation/modernization

Report on line l all capital expenditures on renovation/modernization of existing school buildings.

Line m – Buildings – purchase

Report on line m all capital expenditures on purchase of buildings.

Line n – Buildings – restoration (BQRP)

Report on line n all expenditures from BQRP funding for restoration of existing buildings.

Line o – Equipment

Report on line o all capital expenditures on equipment.

Line p – Vehicles

Report on line p all capital expenditures on vehicles.

Line q – Principal repayments on debt

Report on line q the amount budgeted for principal repayment on debt.

Line r – Interest payment on debt

Report on line r the amount budgeted for debenture interest payments.

Line s – Losses on sale of assets

Report on line s any losses on disposals of capital assets.

Line t – Transfers to capital reserves

Report on line t any transfers of funds to capital reserves.

Line u – Closing balance, August 31, 1996

Report on line u the projected closing balance for the 1995/96 school year.

Line v – Total capital expenditures

Report on line v total capital spending budgeted for 1995/96.

**1995/96 INTERIM EDUCATION PLAN FINANCIAL REPORTING REQUIREMENTS
FOR ACCREDITED PRIVATE SCHOOLS**

Financial information is required in accredited private school interim education plans, based on the Budget Report Form (BRF) for private schools for the 1995/96 school year. The forms for providing financial information in the interim education plans will be sent to accredited private schools along with the updated 1995/96 BRF.

The due date for submission of education plans is linked to the due date for the BRF, which for private schools is November 30. The 1995/96 Accredited Private School Interim Education Plans are due to the Minister of Education by **November 30, 1995**, along with the completed 1995/96 Budget Report Form.

FEEDBACK SHEET

Please tell us what you think about the Guide to Interim School Board Plans. We will use your comments in preparing the guide for three-year education plans and annual results reporting.

What do you find helpful about the Guide?

What concerns do you have about the Guide?

What changes would you suggest be incorporated in the guide for developing three-year education plans?

Please send your comments to Elaine Solez by mail: Policy & Planning Branch, Alberta Education,
1160 Jasper Avenue, Edmonton, AB T5K 0L2 or by Fax: (403) 422-5255; Phone: (403) 427-8217
This page can be folded over and mailed if taped. Do not staple.

STUDENT SHEET

Please tell us what you think about the Guide to Health Care's Student Form. We will use your comments in preparing the Guide for this year's education plans and future needs research.

What do you find helpful about the Guide?

What comments do you have about the Guide?

What changes would you suggest be incorporated in the Guide in developing future education plans?

Policy and Planning Branch
Alberta Education
11160 Jasper Avenue
Edmonton, Alberta
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